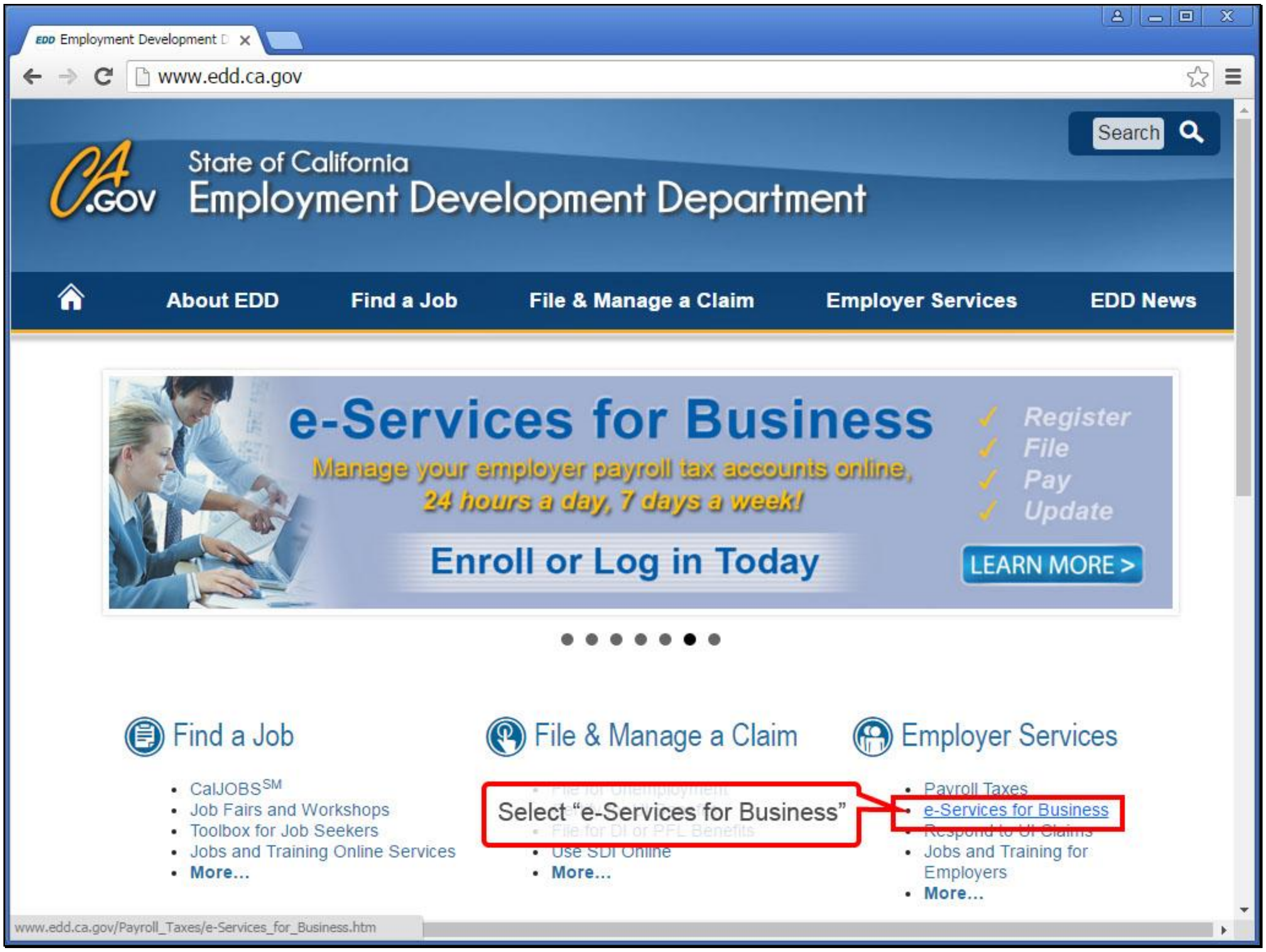
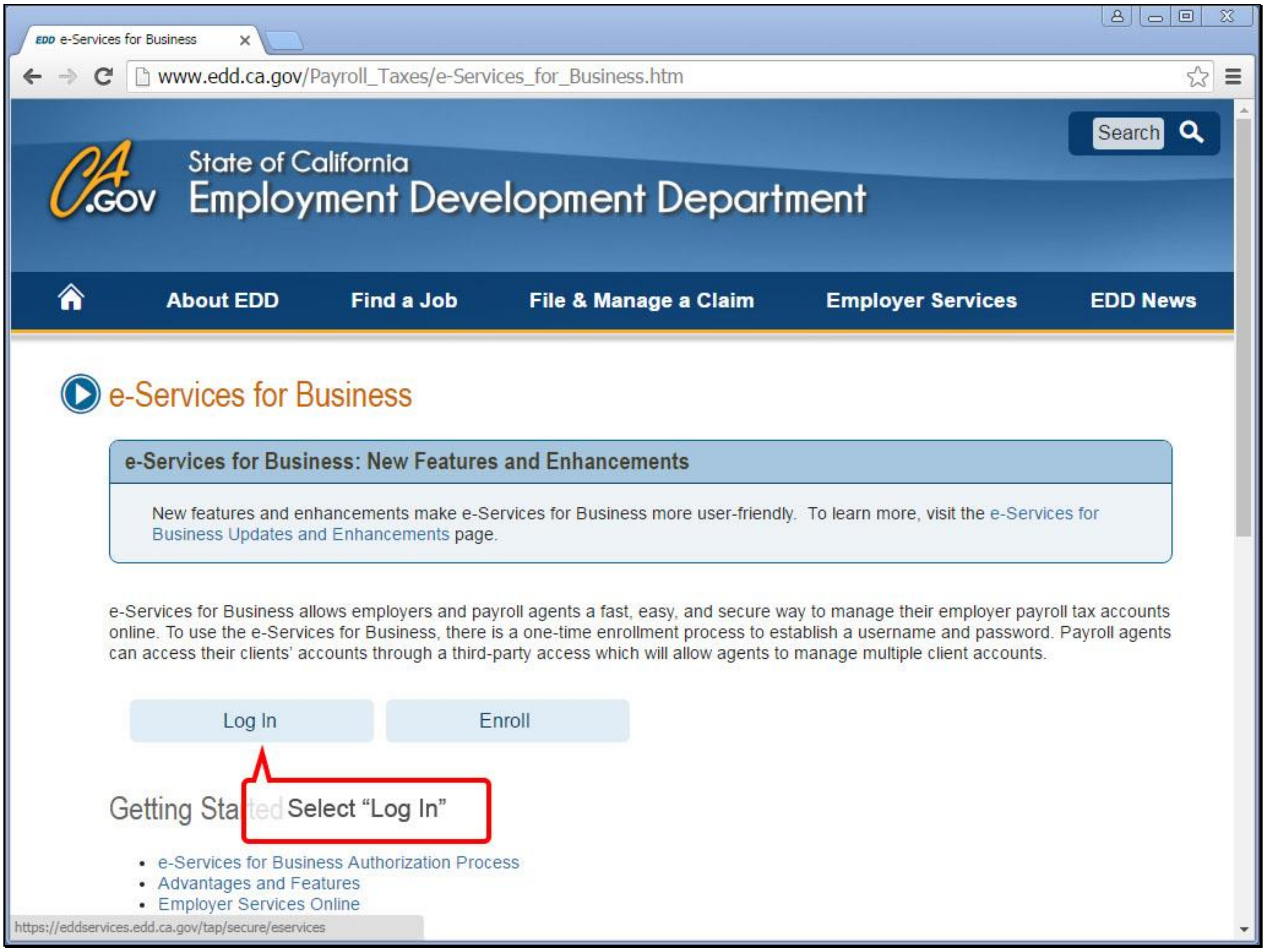
Slide notes

The California Employment Development Department (EDD) developed this tutorial to assist you with navigating through e-Services for Business. This tutorial will show you how to complete the enrollment process as an employer representative/payroll agent and how to access a client’s account in e-Services for Business.



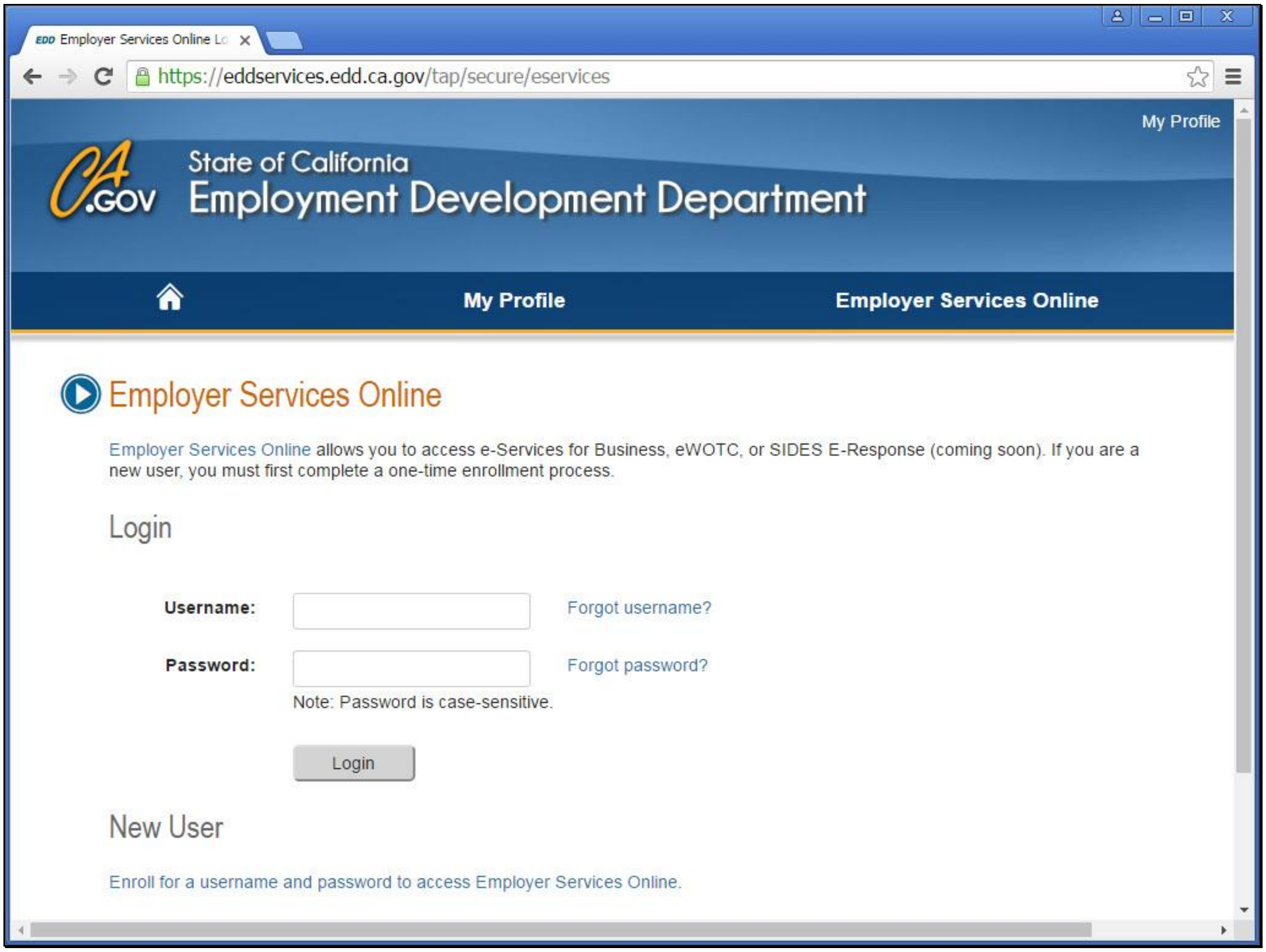
Slide notes

Welcome to the Employment Development Department home page. Notice the "e-Services for Business" hyperlink in the Employer Services column. Select the "e-Services for Business" hyperlink.



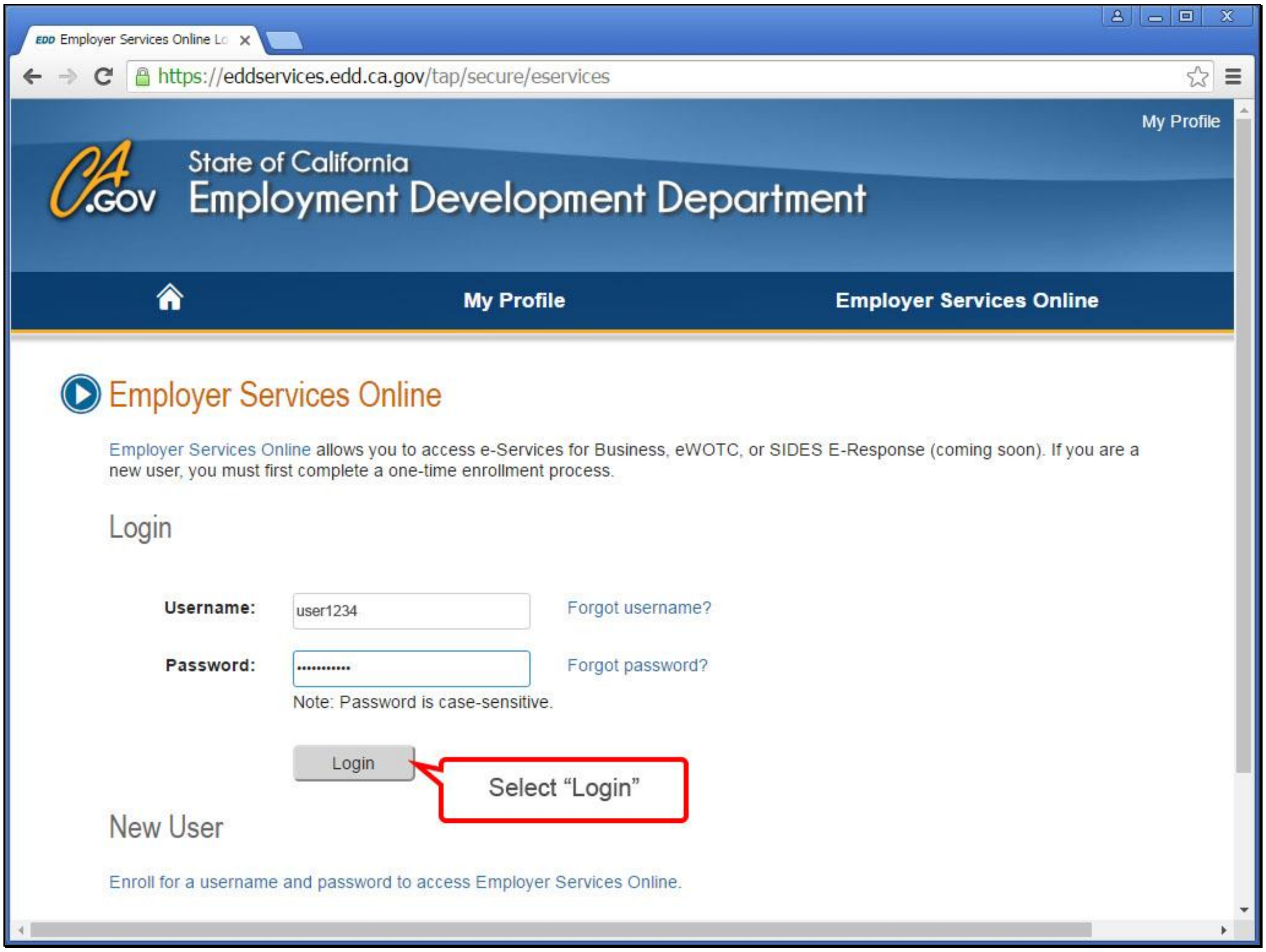
Slide notes

Select the e-Services for Business "Log In" button.



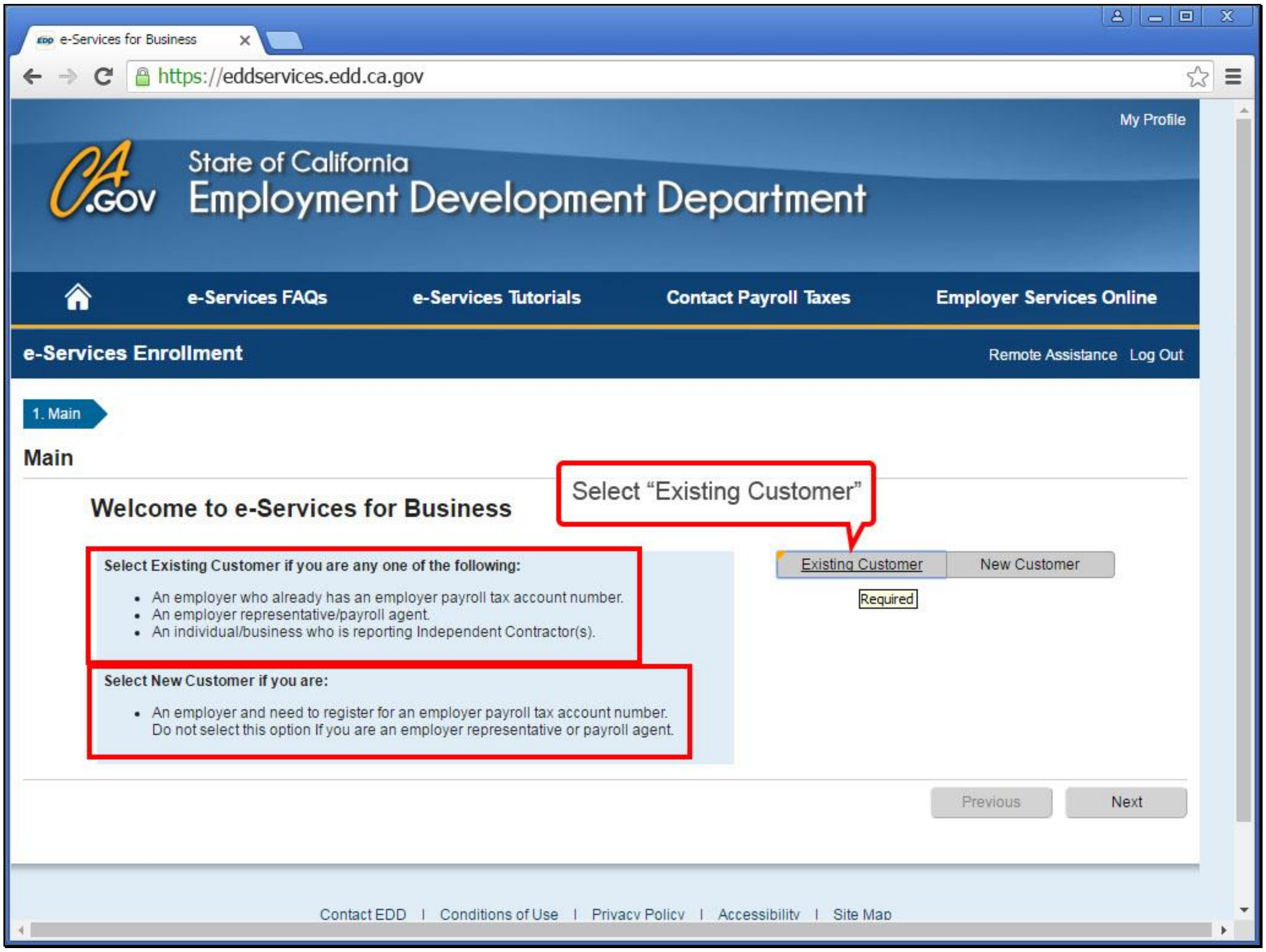
Slide notes

You should already have a username and password established. Enter your username and password.



Slide notes

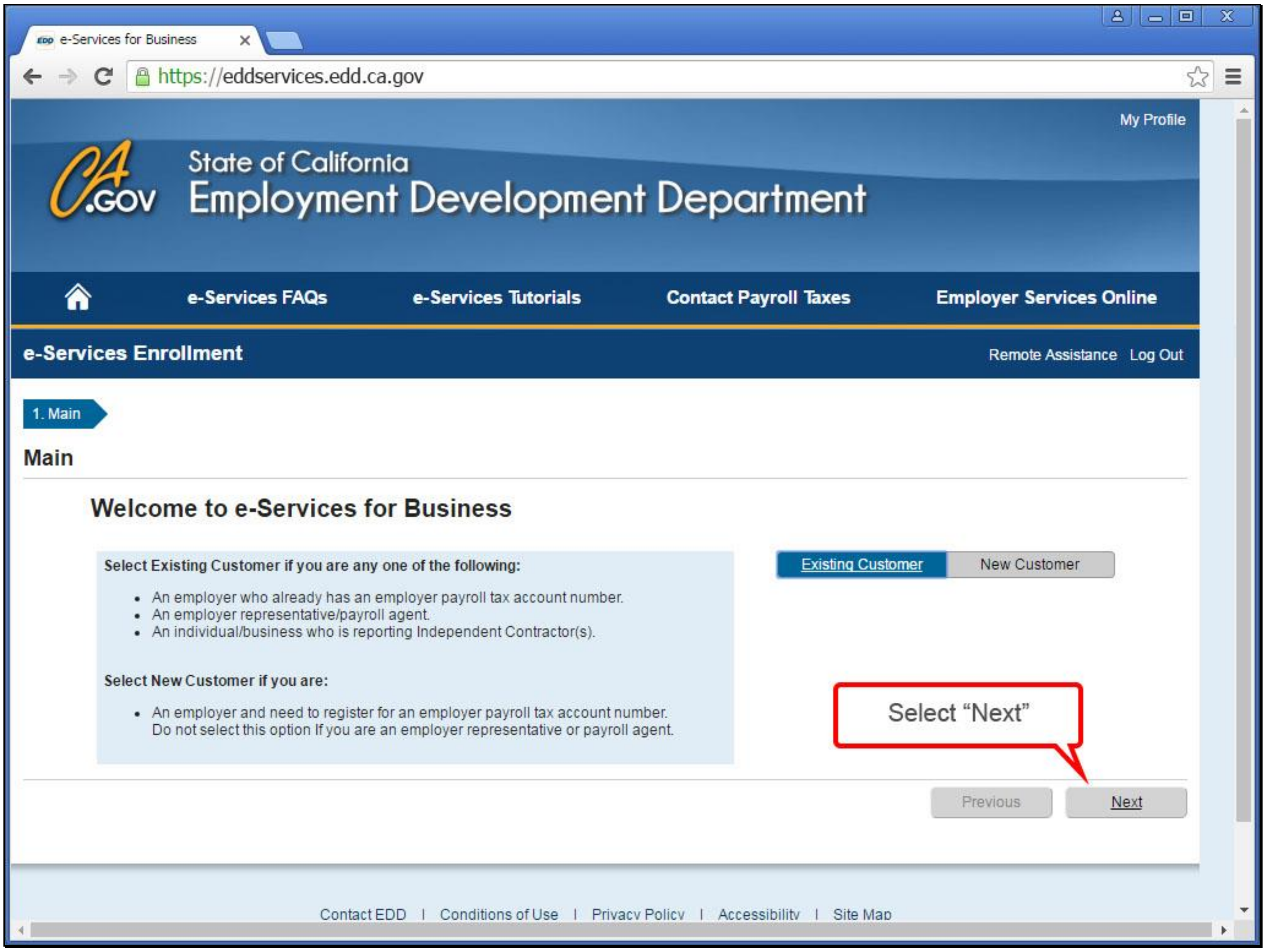
Select "Login" to begin using e-Services for Business.



Slide notes

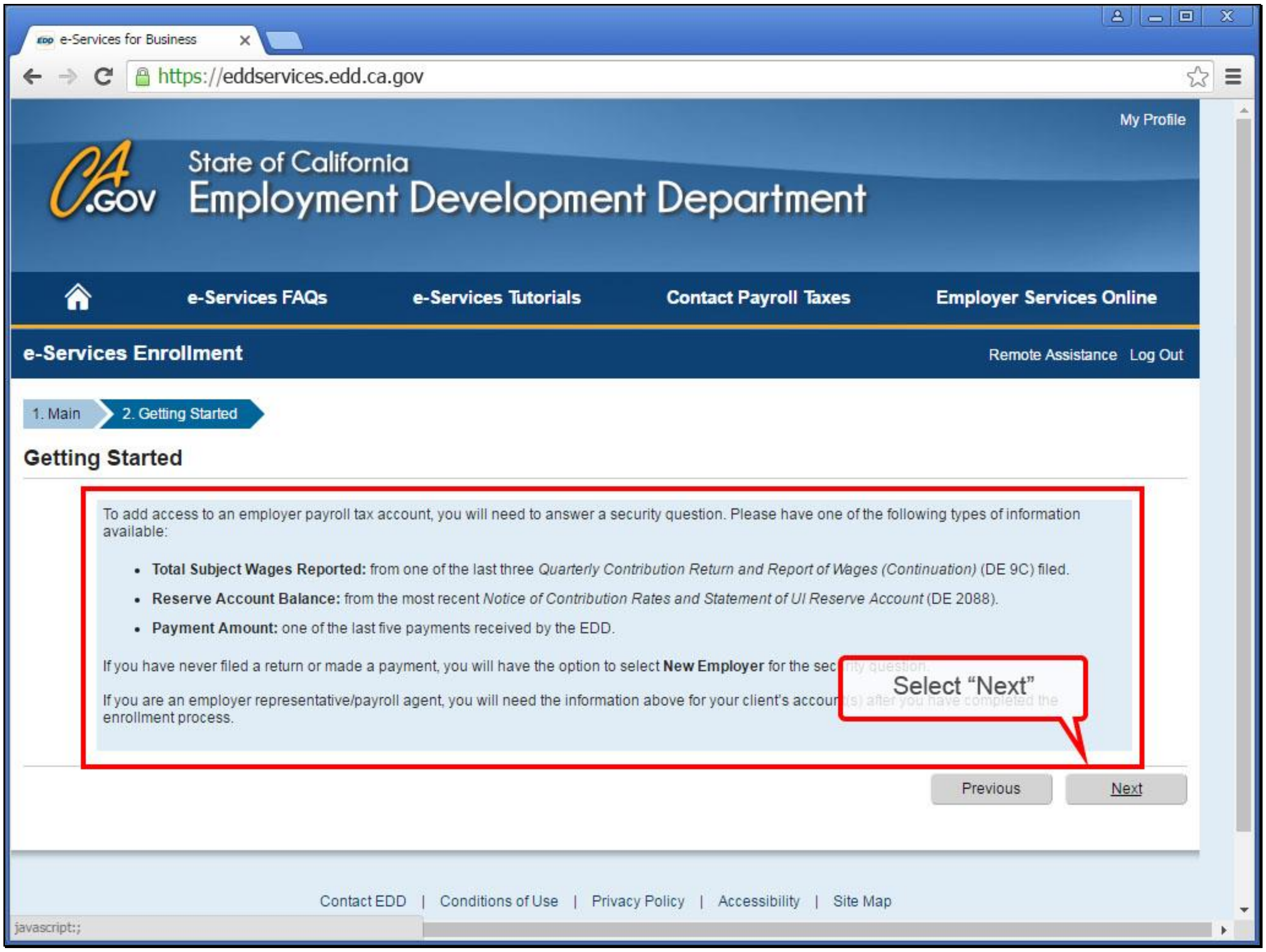
To begin this enrollment, select whether you are an Existing Customer or New Customer. An Existing Customer is an employer who already has an Employer Payroll Tax Account Number or is an employer representative/payroll agent.

Select "New Customer" if you are an employer and would like to apply for an Employer Payroll Tax Account Number. If you are an employer representative/payroll agent do not select this option. For this tutorial, we are going to select "Existing Customer" Select "Next" to continue.



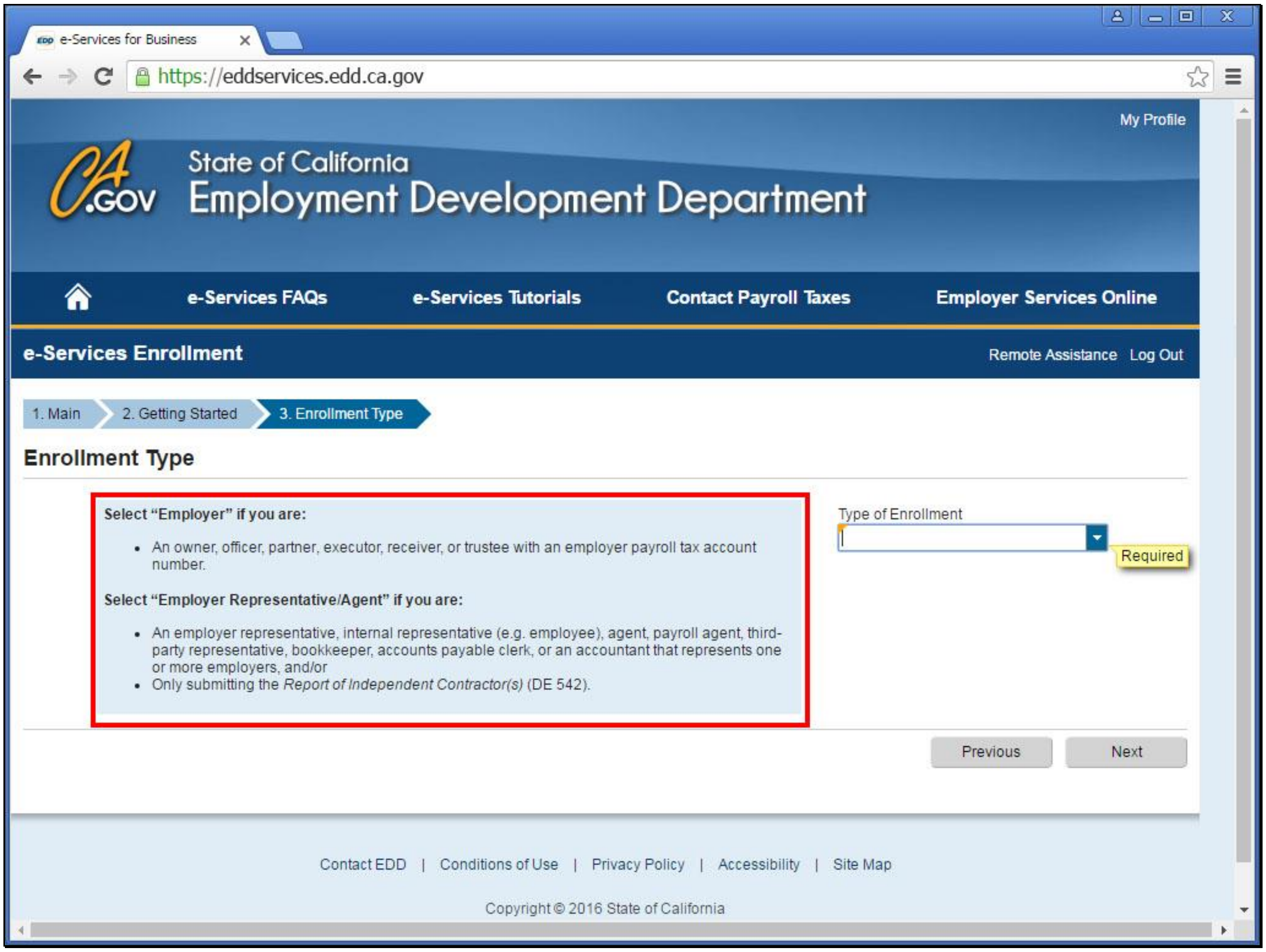
Slide notes

Select "Next" to continue.



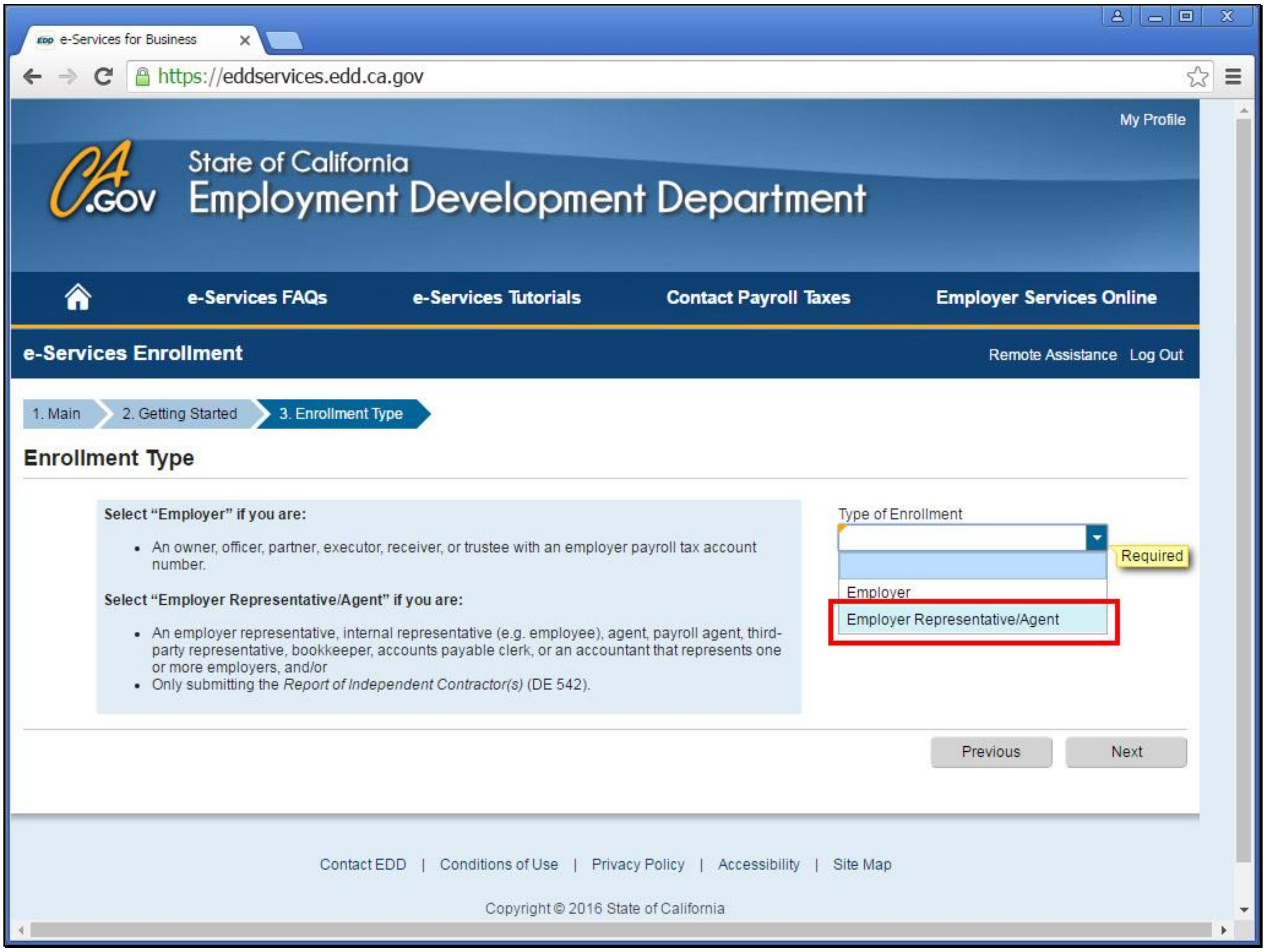
Slide notes

To add access to an employer payroll tax account, you will need to answer a security question. Be prepared to answer one of the questions listed here. Select "Next" to continue.



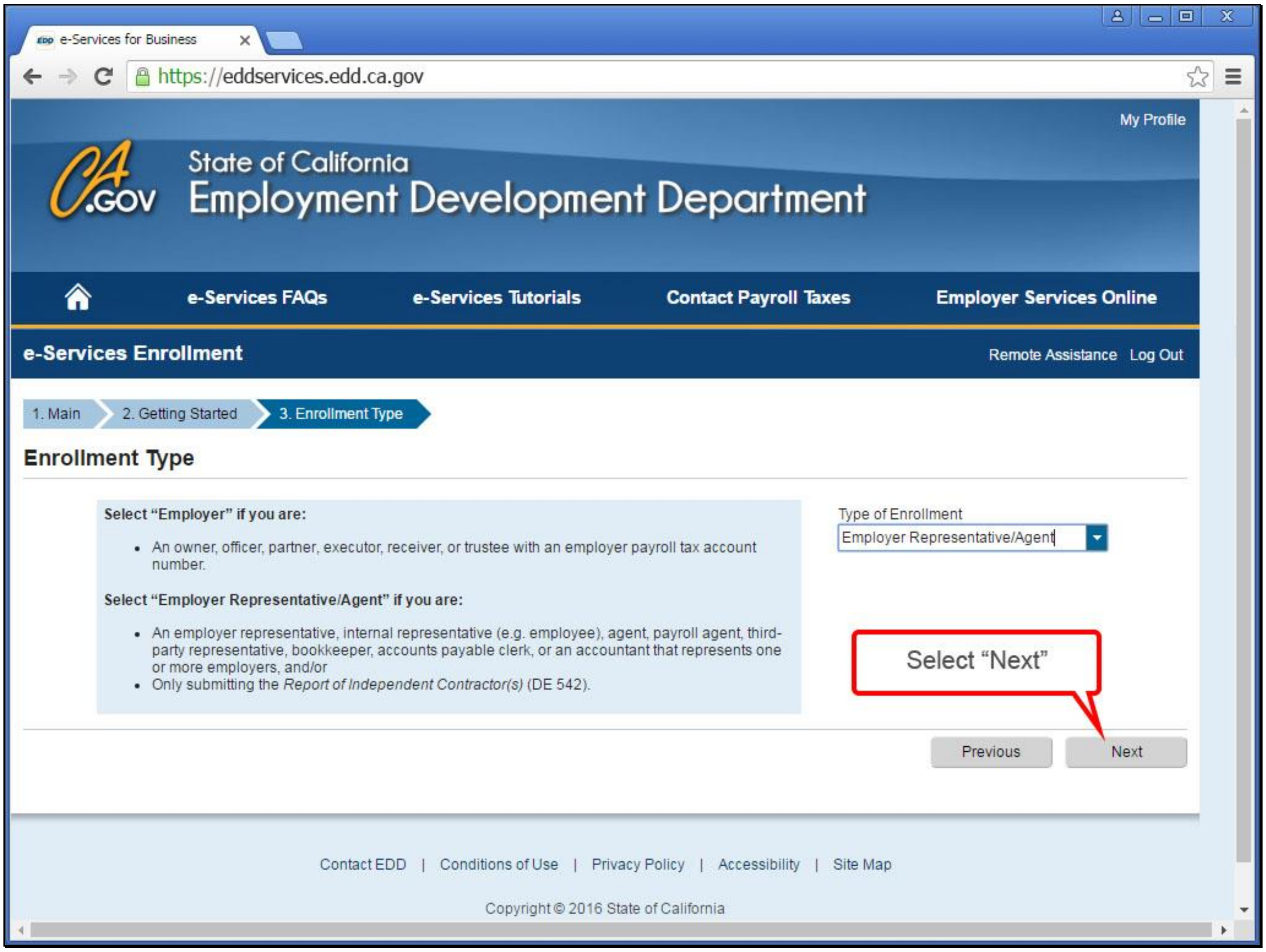
Slide notes

The two types of enrollment are either an "Employer Representative/Payroll Agent" or "Employer." Please take a moment and read this important message. Take time to find out what type of enrollment you want to utilize. This is a detailed explanation of the two choices.



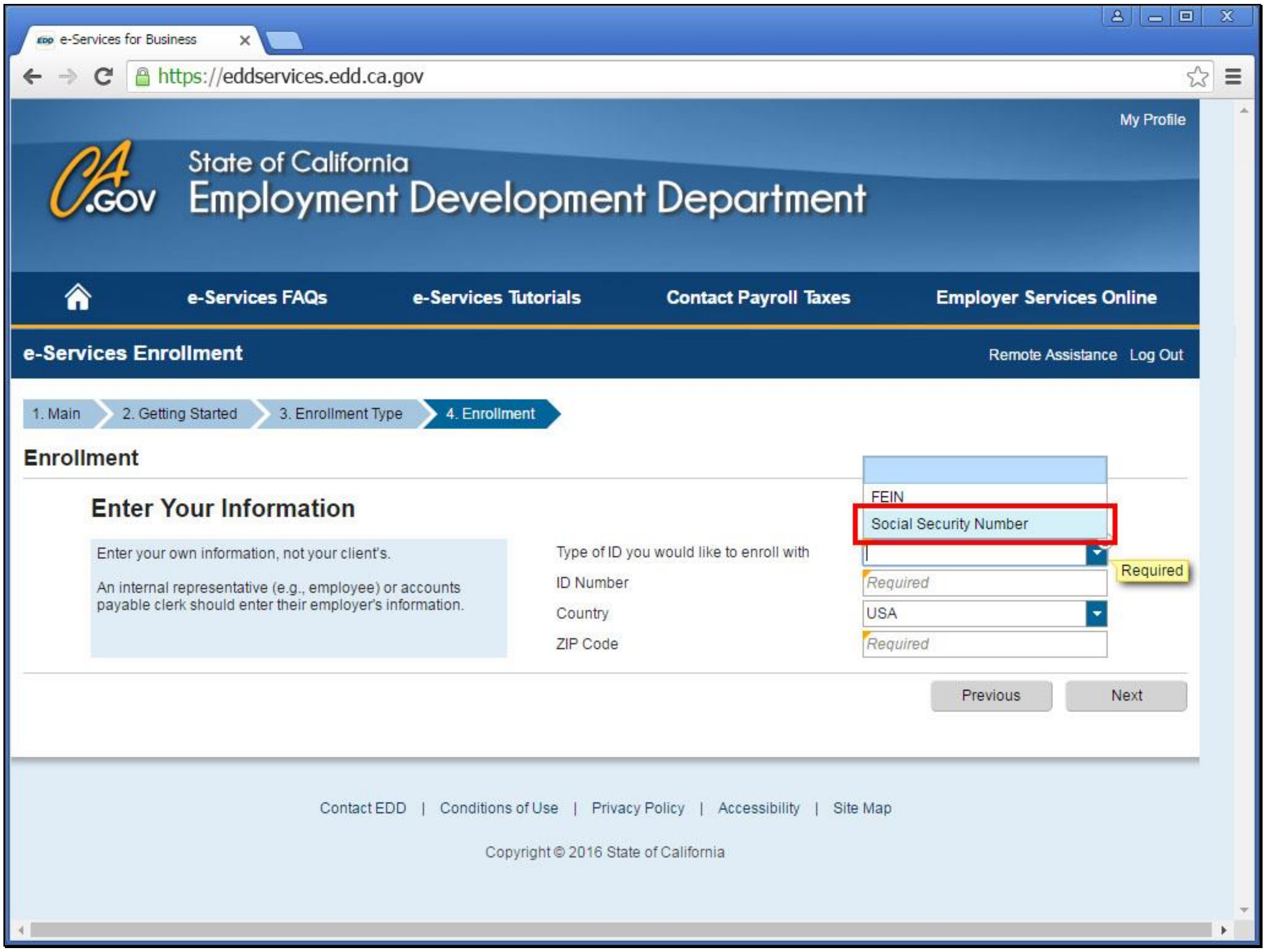
Slide notes

In this example, we are going to choose "Employer Representative/Agent."



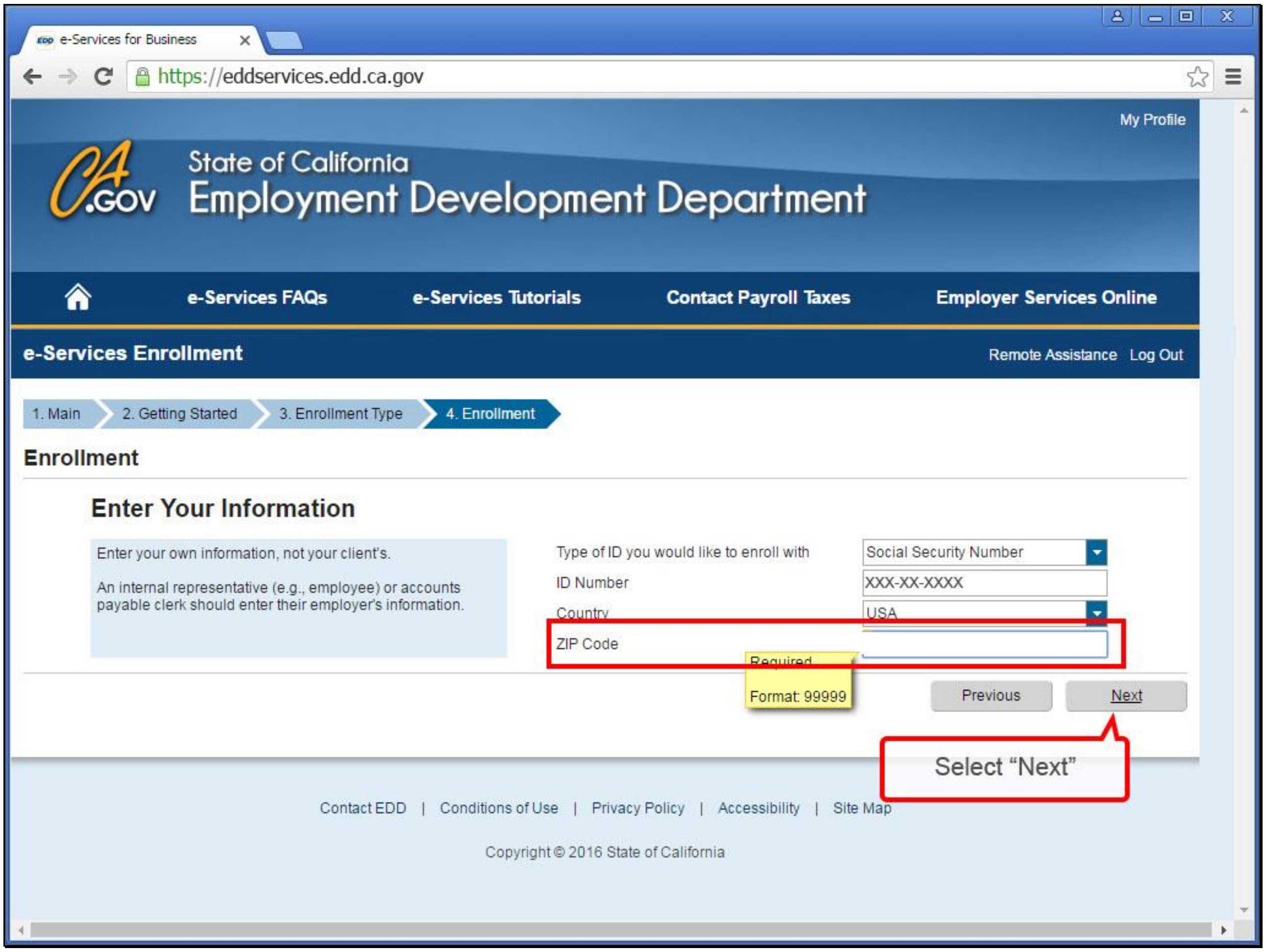
Slide notes

Select "Next" to continue.



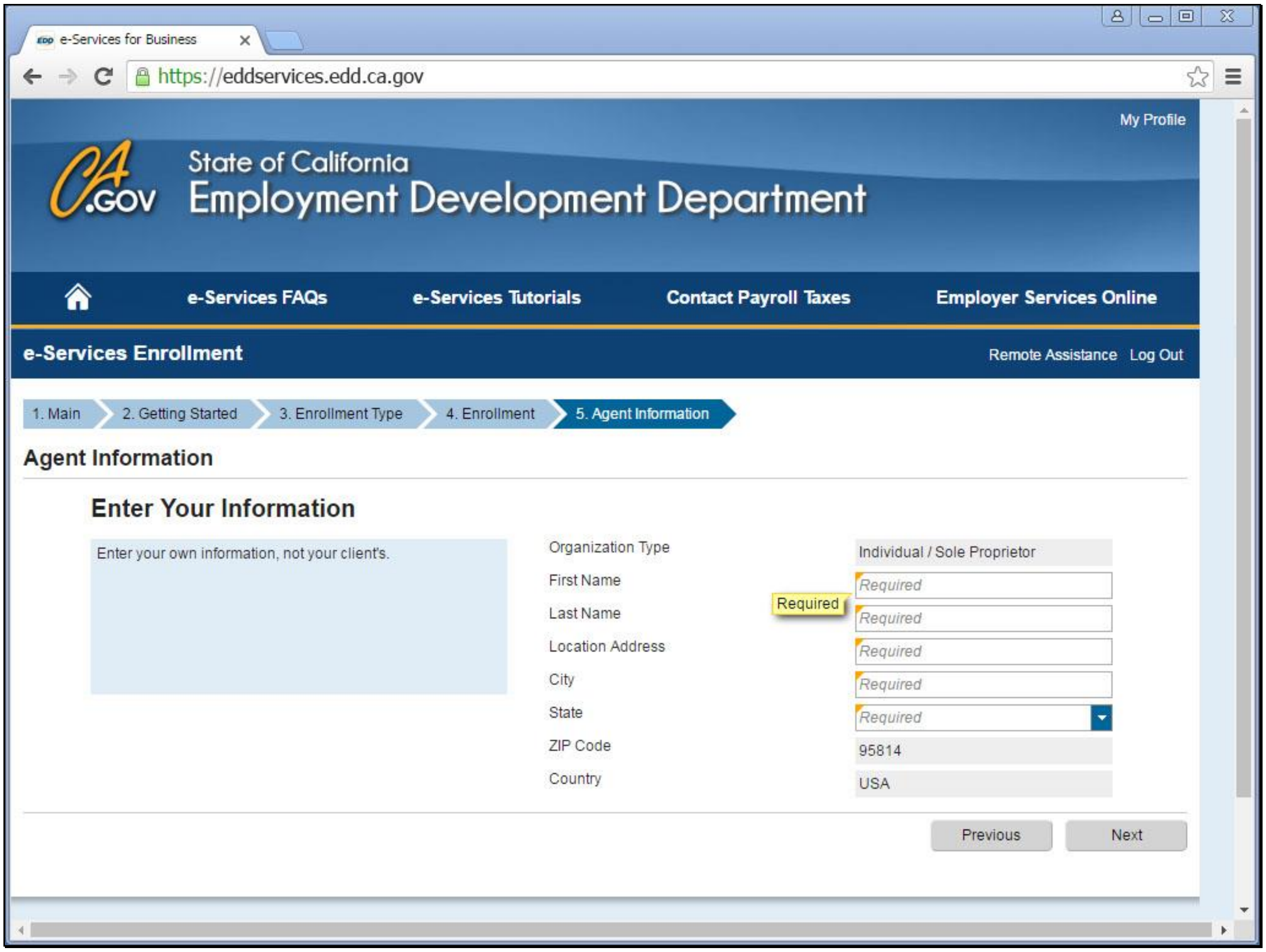
Slide notes

You have a choice of Social Security Number (SSN) or Federal Employer Identification Number (FEIN). If you are currently a business with a FEIN, you may select it. If you are an individual, you may select Social Security Number. For this example, we select "Social Security Number."



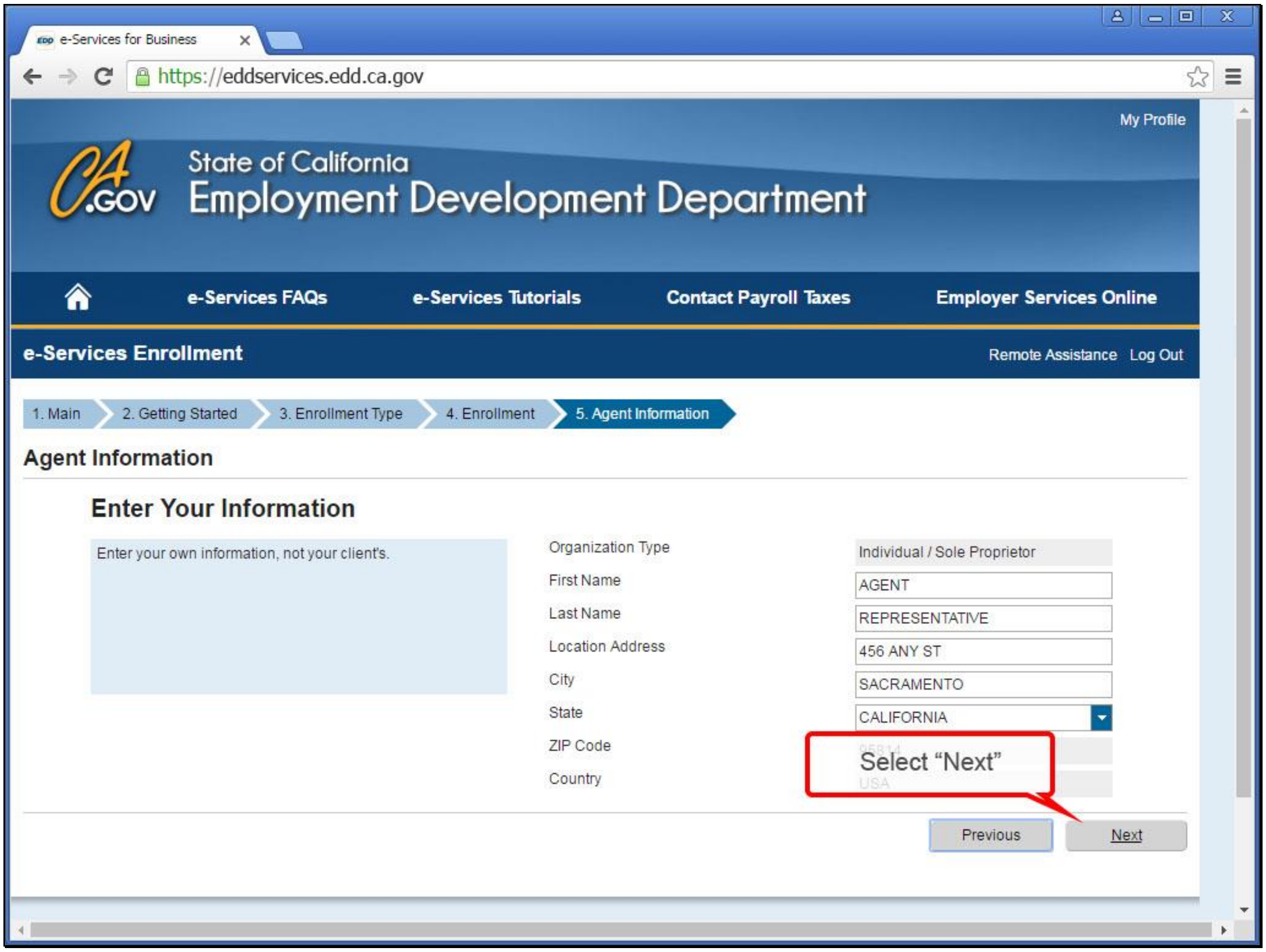
Slide notes

Enter the ZIP Code related to the FEIN or SSN that you entered. When all fields are completed, select "Next" to continue.



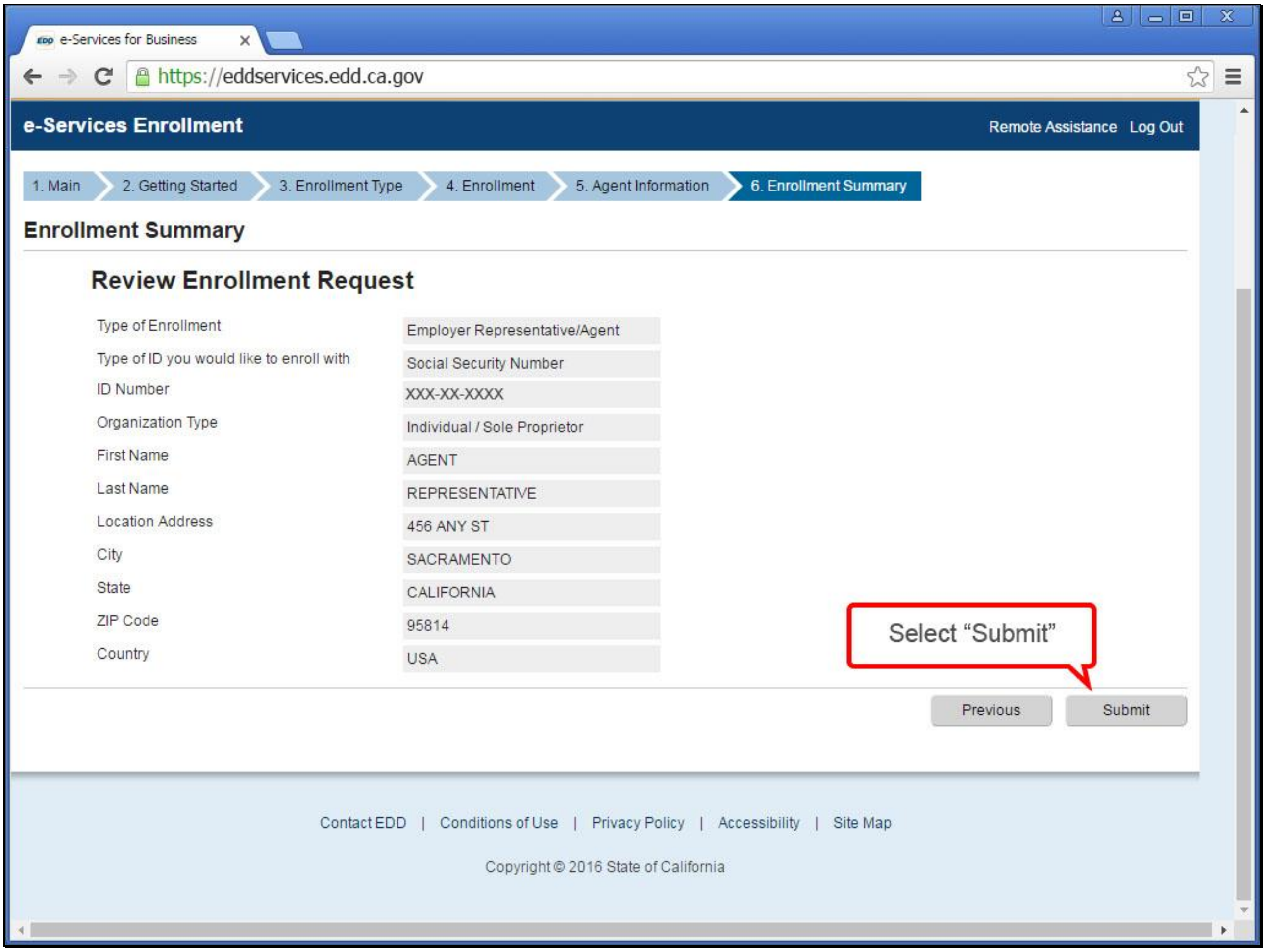
Slide notes

Complete this page with your own information, not your clients.



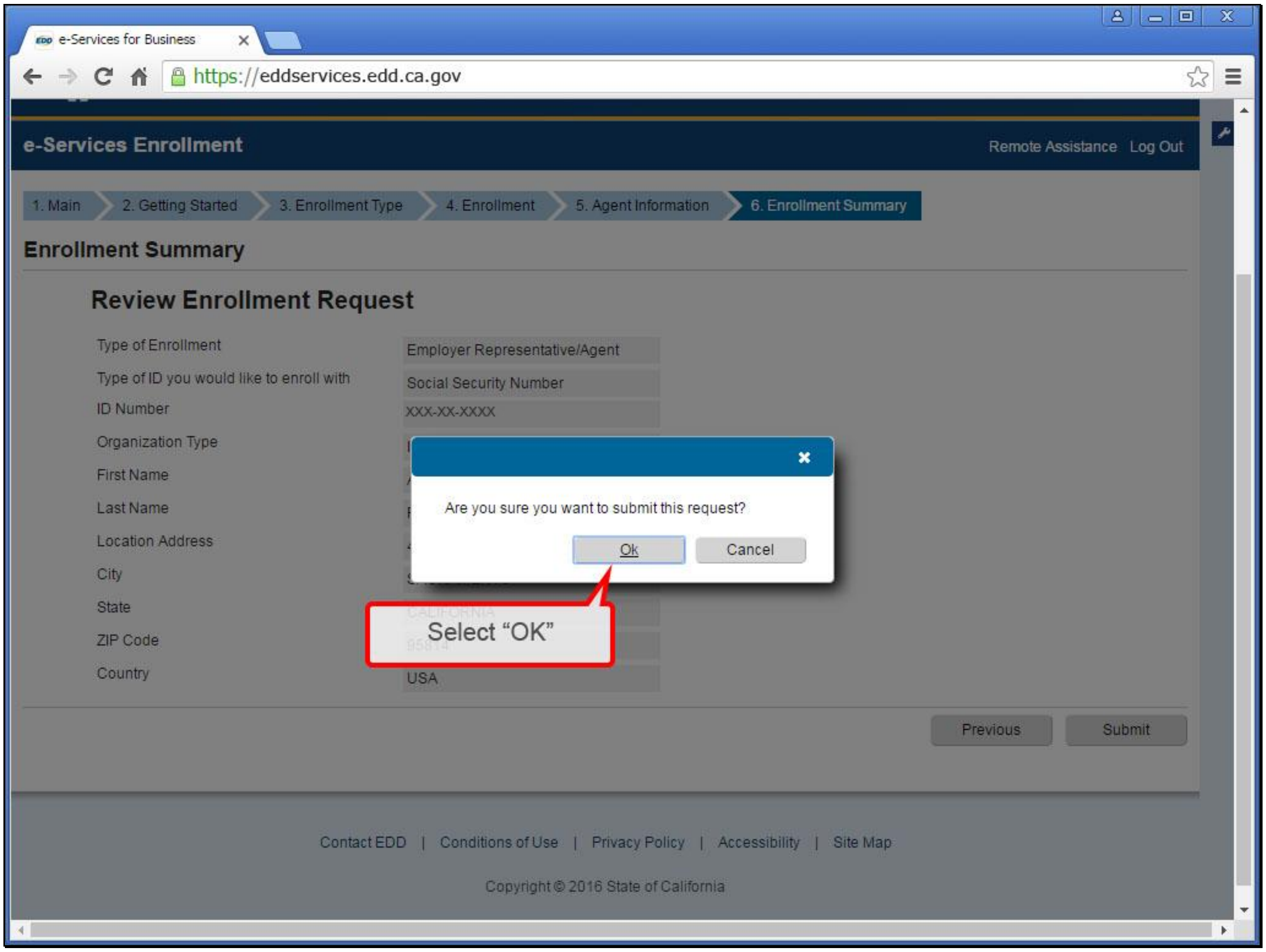
Slide notes

When the information is completed, select "Next" to continue.



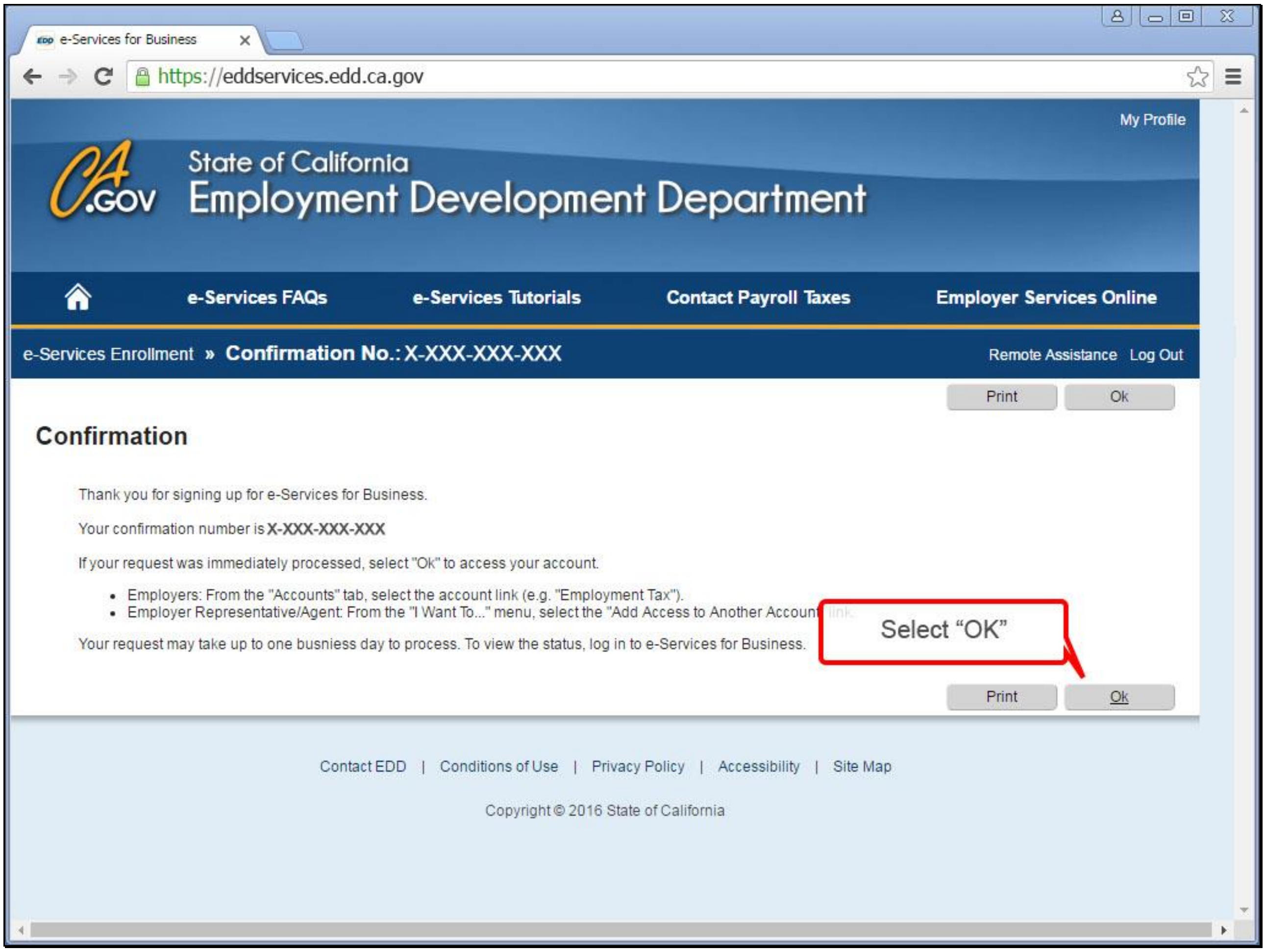
Slide notes

Now you are ready to submit this request. Select "Submit."



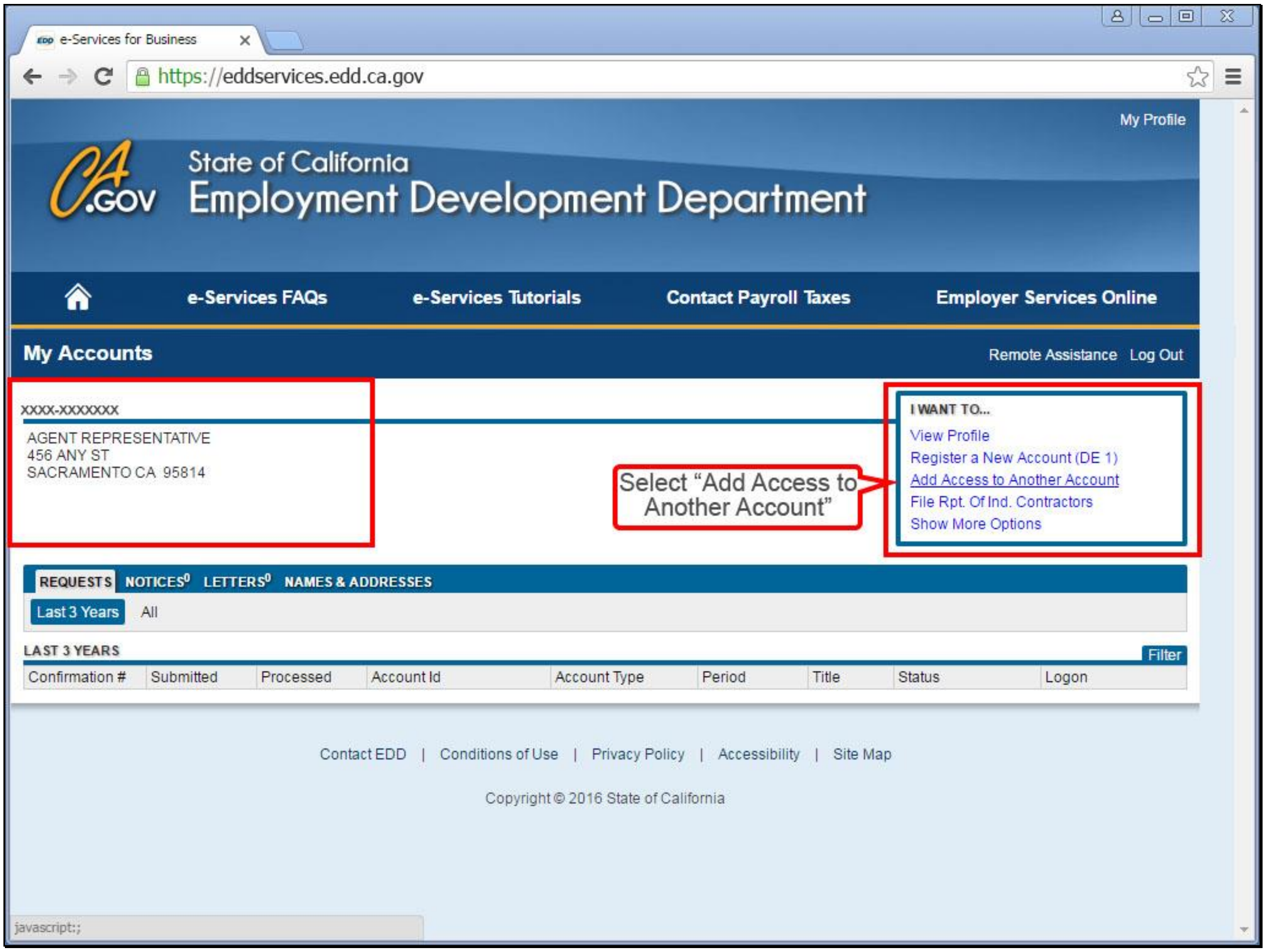
Slide notes

Are you sure you want to submit this request? Select "OK."



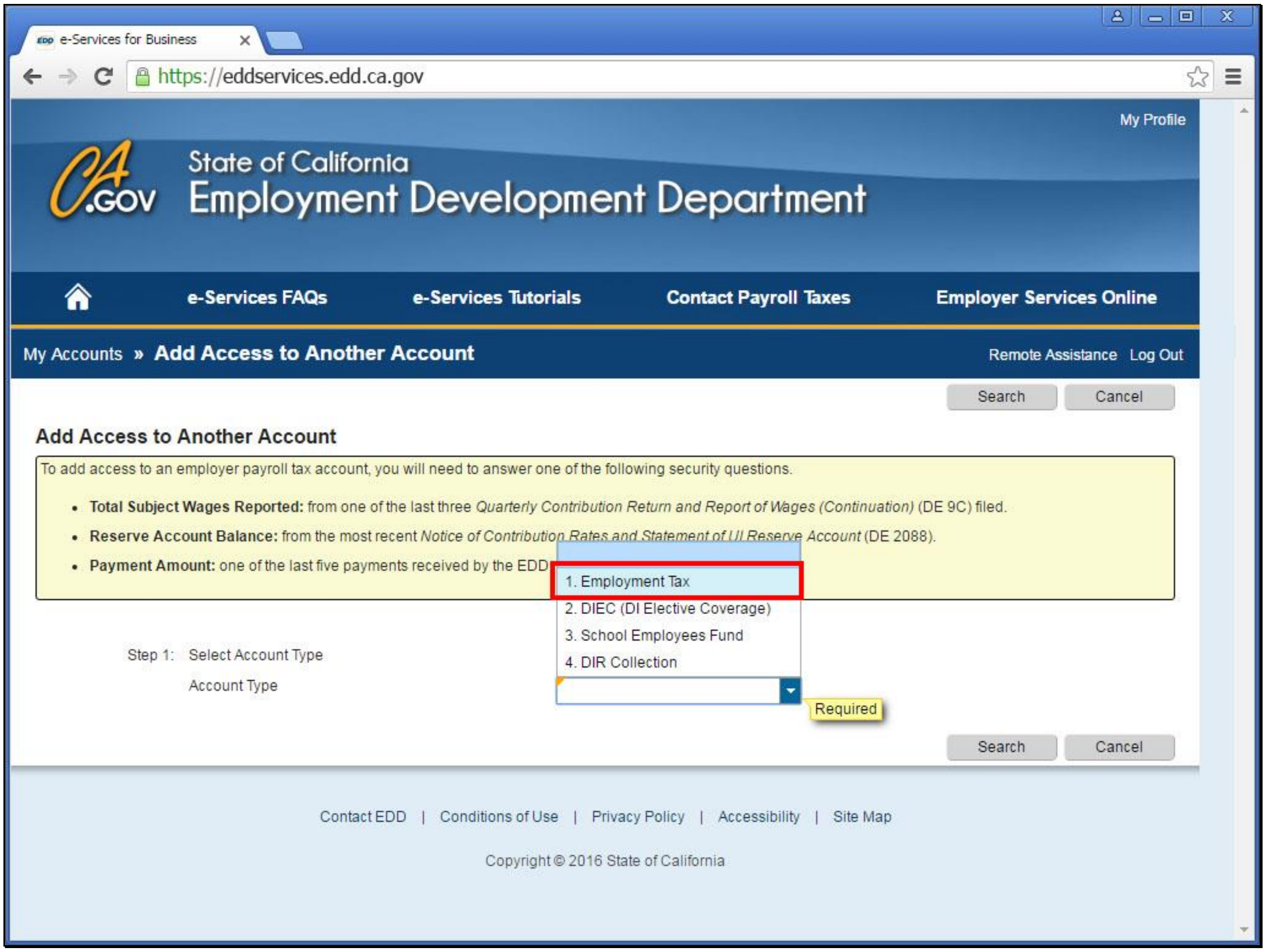
Slide notes

Here is your confirmation number. Your enrollment request is being processed. Select "OK to continue.



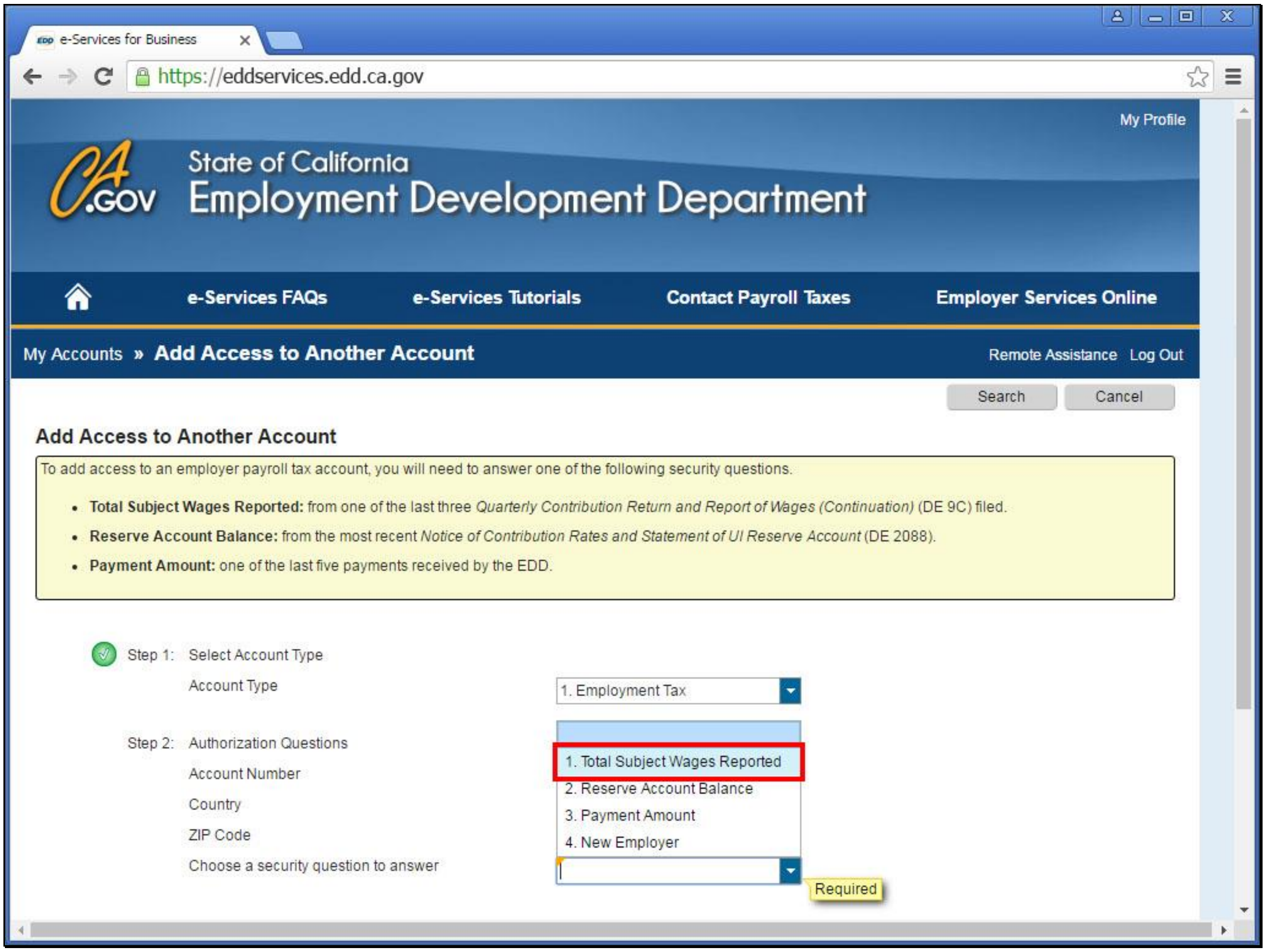
Slide notes

The e-Services for Business home page screen shows a summary of your enrollment information as the agent. The summary section displays your profile details including taxpayer names and addresses. From the "I Want To…" menu, select the hyperlinks in this section to navigate to windows that allow you to perform the stated action. Select "Add Access to Another Account" in order to gain access to your client's account. These steps would need to be repeated to gain access for each client account number.



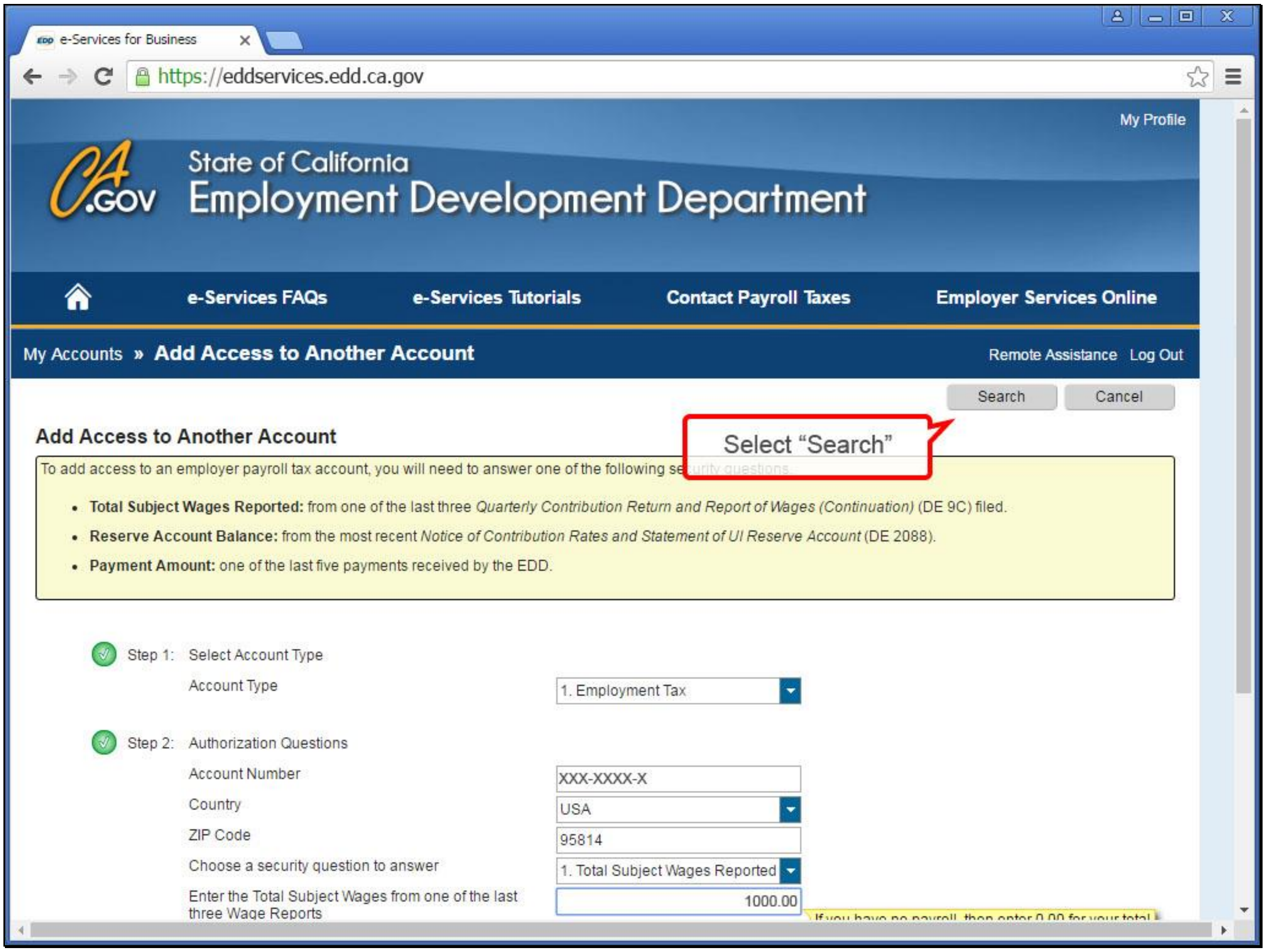
Slide notes

Select "Account Type." For this example we select "Employment Tax."



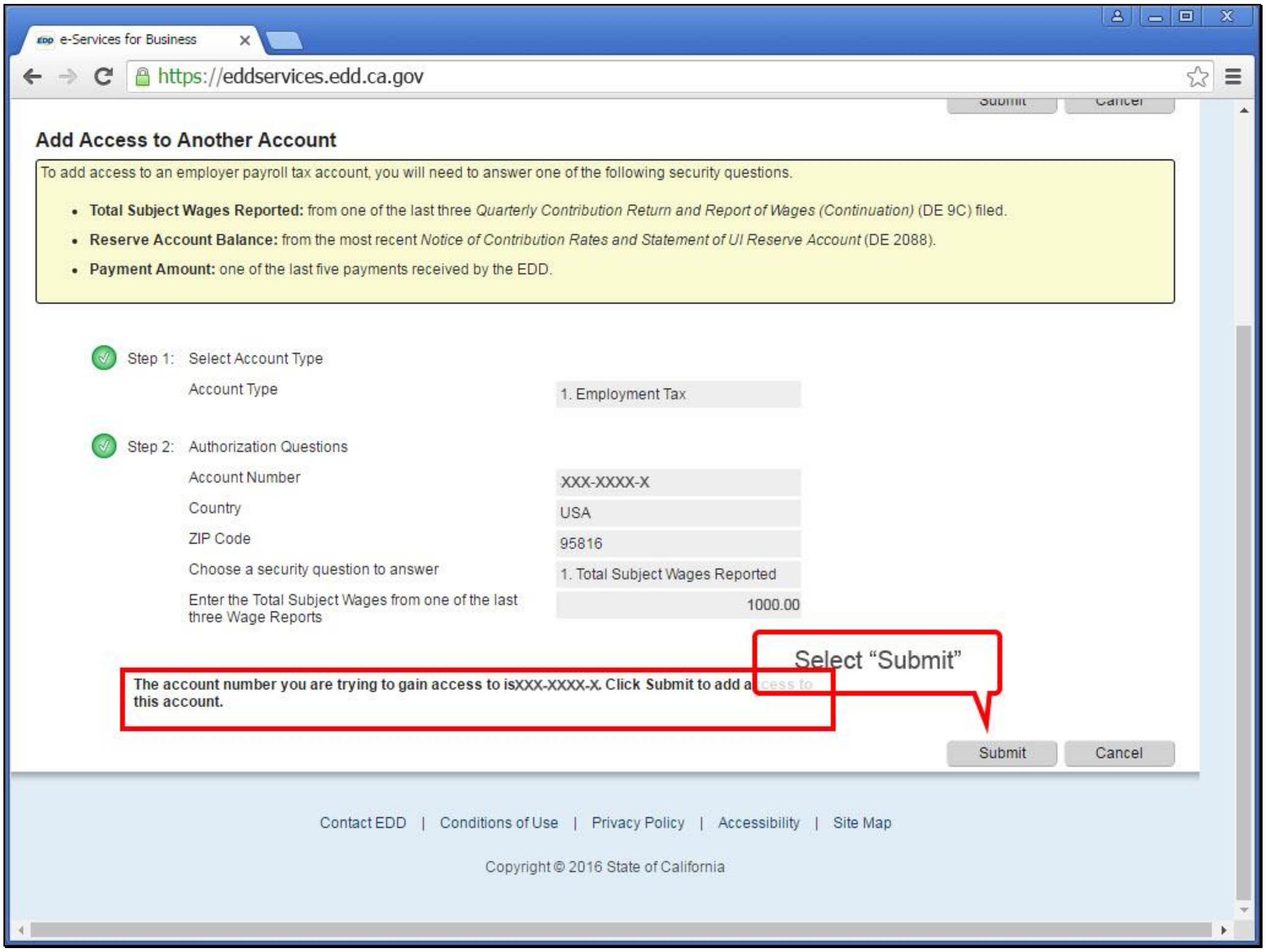
Slide notes

Choose an additional question to answer. We chose "Total Subject Wages Reported."



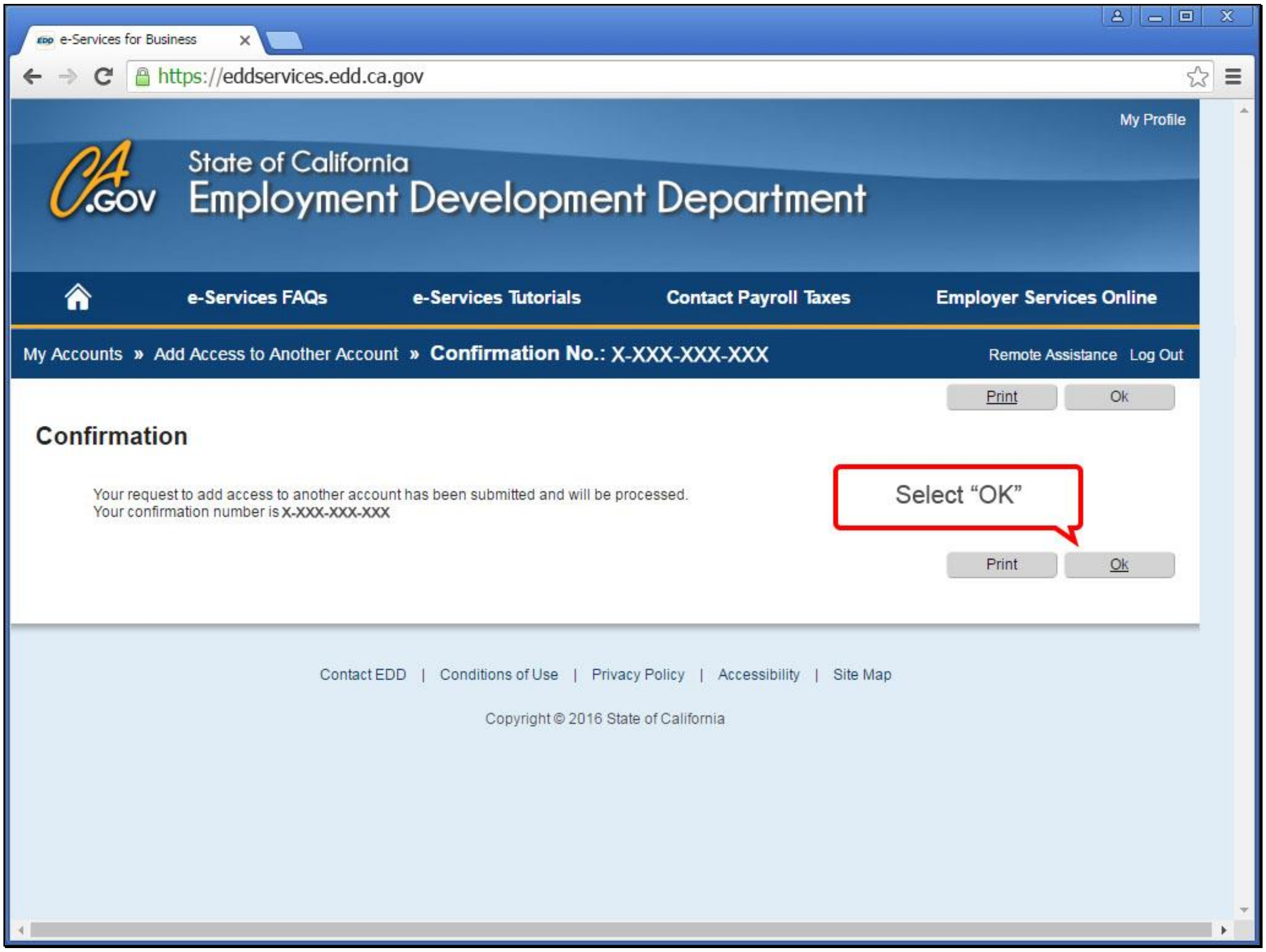
Slide notes

Select "Search" to continue.



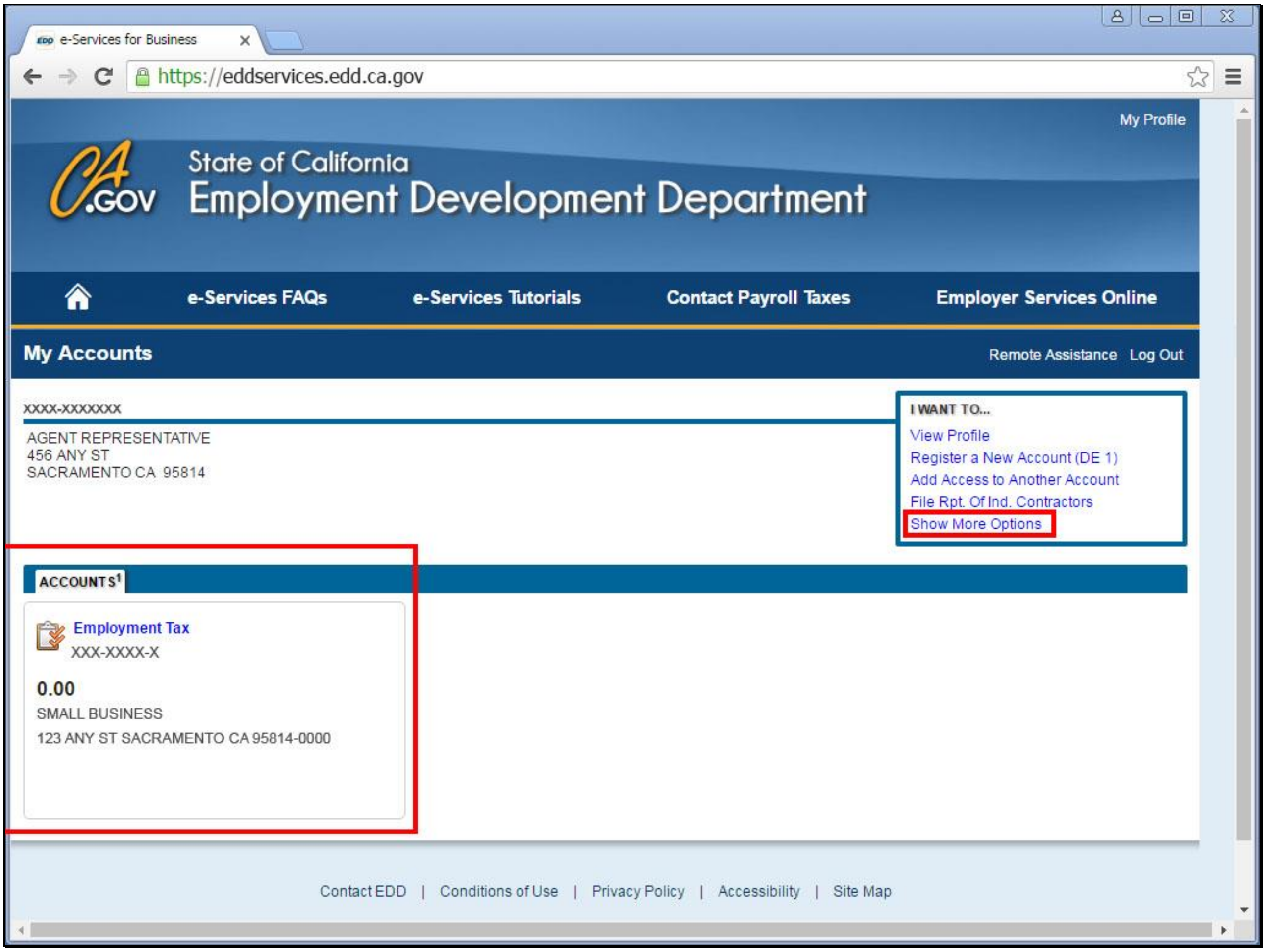
Slide notes

The message at the bottom informs you that you are trying to add access to the specified account. Select “Submit” to add access to this account.



Slide notes

The request to add access to another account has been submitted and will be processed. Select "OK" to continue.



Slide notes

As you can see, we have added access to this account. It is located under the "Accounts" subtab on the home page. There are many other actions on the home page that an employer representative or payroll agent may find helpful for managing multiple accounts.

Most of these actions can be accessed by selecting the "Show More Options" hyperlink in the "I Want To…" menu.

Slide notes

Thank you for taking the time to watch this tutorial on how to enroll and navigate through e-Services for Business as an employer representative or payroll agent. Be sure to view our other tutorials demonstrating how to file bulk returns, make bulk payments, and the many other actions available in e-Services for Business. Other resources are available at www.edd.ca.gov or by calling the Taxpayer Assistance Center at 1-888-745-3886.